



**DATE:** \_\_\_\_\_

What prompted the customer to call us? (Ask: "What made you call today?")

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Was bonding and rapport established? (Think about mirroring/matching and DISC.)  
"D" "I" "S" "C"

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What is the prospect's primary pain (or reasons for doing the project)?

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**CUSTOMER NAME:** \_\_\_\_\_

**HOME PHONE:** \_\_\_\_\_

**CELL PHONE:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

\_\_\_\_\_

Who else would like to be involved in the meeting?

\_\_\_\_\_  
\_\_\_\_\_

How did the prospect find out about us? Previous client?

\_\_\_\_\_  
\_\_\_\_\_

What is the prospect's approximate timing for this project? (Is it urgent, or no rush?)

\_\_\_\_\_  
\_\_\_\_\_

# Lead Intake Sheet *(cont'd.)*

Was there a budget that the prospect would like to share, or quotes received previously? (Just ask; don't push hard.)

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What is the clear next step? (If appointment is set, will all decision makers be present?)

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Time for outside sales consultant to call before appointment: \_\_\_\_\_

Time for appointment at the prospect's home: \_\_\_\_\_

Duration of appointment: \_\_\_\_\_

Other information that might help the outside sales consultant:

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